## WEEK 1: BE VISIBLE AND GET THE LAY OF THE LAND

- **Orientation** (tour clinic, get keys, order business cards, etc.)
- Clinic systems trainings (human resources, EHRs, etc.)
- Learn to use new pager and/or cellphone (if applicable)
- Setup voicemail, email, instant messaging, etc.
- Add contact information to provider roster and all medical staff email group lists
- Post list of staff and PCP contact numbers at your workstation
- Meet everyone in the clinic (if possible), ask about their duties if you are not sure
- Schedule meetings clinic manager, lead RN, supervisor
- Meet or schedule meetings with senior leadership
- Obtain list of clinic meetings and determine which to attend regularly
- Stay late one day, observe the afterhours situation
- Draft BHC services brochure; after approval, copy and distribute (see Chapter 9)
- Draft BHC Services Announcement poster; after approval, copy and post (see Figure 10.2)
- Draft educational handout; *GATHER: The Essentials of Primary Care Behavioral Health* (see Figure 10.3)
- Study PCBH program manual, or draft a manual if one has not already been made; pass along to leadership
- Craft and memorize the BHC introduction for initial visits (see Chapter 9, Table 9.1, Figure 9.3)
- Read *Behavioral Consultation and Primary Care* (Chapters 2, 5, 6) to learn about the PCMH team and the Core Competency Tools for BHCs, PCPs and RNs
- Assess skill level on the BHC Core Competency Tool, clarify training needs with supervisor or mentor
- Meet or talk by phone with a BHC working in a similar PC setting (shadow if possible)
- Meet with scheduling staff to discuss how to develop schedule template
- Work with clinic management concerning scheduling processes
- Develop fact sheet for PCPs and RNs about connecting patients with BHC services (see Figure 10.4)
- Work with Information Technology Staff to form BHC template (see Chapter 9, Figure 9.7)
- Clarify the billing plan (or start to develop one, if needed)
- Shadow several PCPs and a RN for part of a day (use a BHC Shadowing Note Sheet, Figure 10.5)

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• Draft survey for PCPs: What problems do they most desire help with (see Figure 10.6)

• Form a BHC Team, set meeting time

• Visit or call important social service organizations that you are likely to use

**WEEK 2: BEGIN PATIENT CARE AND CONTINUE SERVICE PLANNING**

• Begin seeing patients (See every patient referred)

• Remind PCPs to interrupt as needed for same-day appointments

• Practice selected behavioral health measure scoring to improve speed

• Practice Life Context and Functional Analysis questions in role plays and with patients

• Check quality of first chart notes using PCBH Chart Review Tool (see Chapter 9)

• Walk through the halls every hour when not busy with a patient

• Distribute handout for staff to introduce yourself and the BHC service (provide copies of BHC brochure, too) (see Figure 10.2)

• Consider what groups or classes you might start in response to PCPs response to survey; discuss with others

• Consider what pathways you might propose in response to PCP response to survey; discuss with others

• Speak at a provider meeting (if there is one) and provide an update

• Shadow more PCPs

• In free moments, read *Behavioral Health in Primary Care: A Practitioner’s Handbook* (Hunter, Goodie, Oordt, & Dobmeyer, 2009) to learn more about clinical interventions for common problems in PC

• Meet or talk by phone with a more experienced BHC colleague (discuss survey results, questions, CC Tool skill development targets)

• Talk with interpreters about BHC services

• Reflect on how your work with support staff is going

• Talk with referral manager and explore affiliated specialty MH service (if applicable)

• Talk with representatives from schools in the area; provide copies of BHC brochure

**WEEK 3 AND BEYOND: BE A TEAM PLAYER AND A TEACHER**

• Attend clinic huddles

• Use “Request of the Week” communication strategy at huddles (Figure 10.7)
- Offer to preview schedules with PCPs to identify warm-handoffs, particularly with PCPs who use BHC less
- Continue to shadow PCPs when free
- Develop needed or requested patient education materials
- Schedule standing time in provider and staff meetings
- Coach PCPs and RNs on what to say to patients about BHC services (see Figure 10.8)
- Push for increased variety in types of referrals from all PCPs & RNs (see Figure 10.9)

### WEEK 4 AND BEYOND: EXPAND AND EVALUATE

- Develop a behavioral health newsletter to distribute regularly to staff and PCPs
- Conduct pilot studies of an initial PCBH Pathway
- Develop psychoeducational classes or group visits
- Spend another day with an experienced BHC with a plan of observing a class or clinical pathway activity
- Prepare to respond to staff requests for help
- Discuss ways the BHC can assist management
- Administer the BARRIERS to Using the BHC (BUB) Questionnaire (Figure 10.10)
- Administer the BARRIERS to Same-day Services (BUS) Questionnaire (Figure 10.11)
- Evaluate and evolve the program

*Figure 10.1. The BHC Start-Up Checklist.*